

EAST Search History

Ref #	Hits	Search Query	DBs	Default Operator	Plurals	Time Stamp
S1	0	online same securities same gift same calculator	US-PGPUB; USPAT; USOCR; EPO; JPO; DERWENT	OR	ON	2007/11/26 15:59
S2	381234	securit\$5	US-PGPUB; USPAT; USOCR; EPO; JPO; DERWENT	OR	ON	2007/11/26 15:59
S3	32917	gift\$3	US-PGPUB; USPAT; USOCR; EPO; JPO; DERWENT	OR	ON	2007/11/26 16:00
S4	5211	charit\$7	US-PGPUB; USPAT; USOCR; EPO; JPO; DERWENT	OR	ON	2007/11/26 16:00
S5	67685	tax\$3	US-PGPUB; USPAT; USOCR; EPO; JPO; DERWENT	OR	ON	2007/11/26 16:00
S6	28	S2 same S3 same S4 same S5	US-PGPUB; USPAT; USOCR; EPO; JPO; DERWENT	OR	ON	2007/11/26 16:00
S7	36624	asset\$3	US-PGPUB; USPAT; USOCR; EPO; JPO; DERWENT	OR	ON	2007/11/26 16:00
S8	6	S6 same S7	US-PGPUB; USPAT; USOCR; EPO; JPO; DERWENT	OR	ON	2007/11/26 16:00
S9	24	S6 and S7	US-PGPUB; USPAT; USOCR; EPO; JPO; DERWENT	OR	ON	2007/11/26 16:04

EAST Search History

S10	1216987	appreciated	US-PGPUB; USPAT; USOCR; EPO; JPO; DERWENT	OR	ON	2007/11/26 16:05
S11	466	S7 with S10	US-PGPUB; USPAT; USOCR; EPO; JPO; DERWENT	OR	ON	2007/11/26 16:05
S12	1	S11 same S6	US-PGPUB; USPAT; USOCR; EPO; JPO; DERWENT	OR	ON	2007/11/26 16:06
S13	2	S11 and S6	US-PGPUB; USPAT; USOCR; EPO; JPO; DERWENT	OR	ON	2007/11/27 09:46
S14	2	"20010037275"	US-PGPUB; USPAT; USOCR; EPO; JPO; DERWENT	OR	ON	2007/11/27 10:22
S15	58230	fidelity	US-PGPUB; USPAT; USOCR; EPO; JPO; DERWENT	OR	ON	2007/11/27 10:22
S16	0	Charitable adj gift adj fund*	US-PGPUB; USPAT; USOCR; EPO; JPO; DERWENT	OR	ON	2007/11/27 10:22
S17	0	Charitable with gift with fund*	US-PGPUB; USPAT; USOCR; EPO; JPO; DERWENT	OR	ON	2007/11/27 10:23
S18	0	gift with fund*	US-PGPUB; USPAT; USOCR; EPO; JPO; DERWENT	OR	ON	2007/11/27 10:23
S19	0	charit* with gift	US-PGPUB; USPAT; USOCR; EPO; JPO; DERWENT	OR	ON	2007/11/27 10:23

EAST Search History

S20	70	charit\$7 with gift with fund\$3	US-PGPUB; USPAT; USOCR; EPO; JPO; DERWENT	OR	ON	2007/11/27 10:24
S21	6	S20 and S15	US-PGPUB; USPAT; USOCR; EPO; JPO; DERWENT	OR	ON	2007/11/27 10:24
S22	1803249	charit\$3 or don\$3	US-PGPUB; USPAT; USOCR; EPO; JPO; DERWENT	OR	ON	2007/11/27 10:25
S23	925263	charit\$7 or donor\$3 or donation\$3 or contribut\$7	US-PGPUB; USPAT; USOCR; EPO; JPO; DERWENT	OR	ON	2007/11/27 10:26
S24	466	appreciated with asset\$3	US-PGPUB; USPAT; USOCR; EPO; JPO; DERWENT	OR	ON	2007/11/27 10:26
S25	381	tax same valuation\$3	US-PGPUB; USPAT; USOCR; EPO; JPO; DERWENT	OR	ON	2007/11/27 10:26
S26	10	S23 and S24 and S25	US-PGPUB; USPAT; USOCR; EPO; JPO; DERWENT	OR	ON	2007/11/27 10:26

ProQuest

[Return to the USPTO NPL Page](#) | [Help](#)[Basic](#)[Advanced](#)[Topics](#)[Publications](#) [My Research
2 marked items](#)

Interface language:

[English](#)

Databases selected: Multiple databases...

Results

24 documents found for: *TEXT(tax valuation) AND TEXT(gift) AND TEXT(prior to transfer of asset*) AND TEXT(appreciated) W/3 TEXT(asset*) AND PDN(<1/21/2000)*

[» Refine Search](#) | [Set Up Alert](#) [All sources](#) [Scholarly Journals](#) [Trade Publications](#) Mark all [2 marked items: Email / Cite / Export](#) [Show only full text](#)Sort results by: [Most recent first](#)

1. [Significant recent developments in estate planning \(part II\)](#)
Nicholas I Pye, Daniel T Vail. The Tax Adviser. New York: Sep 1999. Vol. 30, Iss. 9; p. 642 (9 pages)
[Abstract](#) | [Full text](#) | [Full Text - PDF \(927 K\)](#)

2. [Charitable remainder trusts--final regulations](#)
Conrad Teitel. Trusts & Estates. New York: Aug 1999. Vol. 138, Iss. 9; p. 36 (12 pages)
[Abstract](#) | [Text+Graphics](#) | [Full Text - PDF \(2 MB\)](#)

3. [Taxpayers win in valuing stock of closely held companies](#)
Stanley E Bulua. The CPA Journal. New York: May 1999. Vol. 69, Iss. 5; p. 26 (4 pages)
[Abstract](#) | [Text+Graphics](#) | [Full Text - PDF \(3 MB\)](#)

4. [Deferred payment sales to grantor trusts, GRATs and net gifts: Income and transfer tax elements](#)
Elliott Manning, Jerome M Hesch. Tax Management Estates, Gifts and Trusts Journal. Washington: Jan 14, 1999. Vol. 24, Iss. 1; p. 3 (30 pages)
[Abstract](#) | [Text+Graphics](#) | [Full Text - PDF \(5 MB\)](#)

5. [The year in review: An estate planner's perspective of recent tax developments](#)
Howard M Zaritsky. Tax Management Estates, Gifts and Trusts Journal. Washington: Jan 14, 1999. Vol. 24, Iss. 1; p. 33 (42 pages)
[Abstract](#) | [Full text](#) | [Full Text - PDF \(5 MB\)](#)

6. [The economics of prepaying wealth transfer tax: Part II](#)
Jeffrey N Pennell, R Mark Williamson. Journal of Financial Service Professionals. Bryn Mawr: Jan 1999. Vol. 53, Iss. 1; p. 42 (7 pages)
[Abstract](#) | [Text+Graphics](#) | [Full Text - PDF \(1 MB\)](#)

7. [Toiling in King Solomon's mine: A study in business valuation for transfer tax purposes \(part II\)](#)
Steven A Horowitz. Taxes. Riverwoods: Nov 1998. Vol. 76, Iss. 11; p. 13 (17 pages)
[Abstract](#) | [Full text](#) | [Full Text - PDF \(2 MB\)](#)

8. [Buy-sell and other restrictive agreements: Weaving the fine line between business objectives and estate tax and the importance of consistency](#)
Keith Schiller. Tax Management Estates, Gifts and Trusts Journal. Washington: Sep 10, 1998. Vol. 23, Iss. 5; p. 215 (18 pages)
[Abstract](#) | [Full text](#) | [Full Text - PDF \(2 MB\)](#)

- 9. **Installment Sale, Scin and private Annuity Sales to a Grantor Trust: Income Tax and Transfer Tax Elements**
Jerome M Hesch. **Tax Management Estates, Gifts and Trusts Journal.** Washington: May 14, 1998. Vol. 23, Iss. 3; p. 114 (12 pages)
[Abstract](#) | [Text+Graphics](#) | [Full Text - PDF](#) (2 MB)
- 10. **Striking a good deal in Japan**
Dean Yoost, Todd Landau. **International Tax Review.** London: Mar 1998. Vol. 9, Iss. 3; p. 25
[Abstract](#) | [Full text](#)
- 11. **The year in review: An estate planner's perspective of recent tax developments**
Howard M Zaritsky. **Tax Management Estates, Gifts and Trusts Journal.** Washington: Jan 8, 1998. Vol. 23, Iss. 1; p. 3 (60 pages)
[Abstract](#) | [Text+Graphics](#) | [Full Text - PDF](#) (7 MB)
- 12. **The grantor trust: Handmaiden to the IRS and servant to the taxpayer**
Burton W Kanter, Michael J Legamaro. **Taxes.** Riverwoods: Dec 1997. Vol. 75, Iss. 12; p. 706 (62 pages)
[Abstract](#) | [Full text](#) | [Full Text - PDF](#) (7 MB)
- 13. **Significant recent developments in estate planning**
Jeffrey C Zysik. **The Tax Adviser.** New York: Aug 1997. Vol. 28, Iss. 8; p. 500 (10 pages)
[Abstract](#) | [Text+Graphics](#) | [Full Text - PDF](#) (1 MB)
- 14. **The economics of prepaying wealth transfer tax**
Jeffrey N Pennell, R Mark Williamson. **Trusts & Estates.** New York: Jul 1997. Vol. 136, Iss. 8; p. 40 (11 pages)
[Abstract](#) | [Text+Graphics](#) | [Full Text - PDF](#) (2 MB)
- 15. **The year in review: An estate planner's perspective of recent tax developments**
Zaritsky, Howard M. **Tax Management Estates, Gifts and Trusts Journal.** Washington: Jan 9, 1997. Vol. 22, Iss. 1; p. 3 (59 pages)
[Abstract](#) | [Full text](#) | [Full Text - PDF](#) (6 MB)
- 16. **Life insurance and charitable giving--important tax rules**
Slavutin, Lee. **Taxes.** Riverwoods: Jan 1997. Vol. 75, Iss. 1; p. 29 (10 pages)
[Abstract](#) | [Text+Graphics](#) | [Full Text - PDF](#) (927 K)
- 17. **Planning for the proposed qualified personal residence trust regulations**
Wilfert, David J. **The Practical Tax Lawyer.** Philadelphia: Winter 1997. Vol. 11, Iss. 2; p. 35 (8 pages)
[Abstract](#) | [Full text](#) | [Full Text - PDF](#) (744 K)
- 18. **The year in review: An estate planner's perspective of recent tax developments**
Zaritsky, Howard M. **Tax Management Estates, Gifts and Trusts Journal.** Washington: Jan 11, 1996. Vol. 21, Iss. 1; p. 3 (53 pages)
[Abstract](#) | [Full text](#)
- 19. **Significant recent developments in estate planning (Part I)**
Nager, Ross W, Abbin, Byrle M. **The Tax Adviser.** New York: Nov 1995. Vol. 26, Iss. 11; p. 674 (9 pages)
[Abstract](#) | [Full text](#) | [Full Text - PDF](#)
- 20. **The evolution of sophisticated tax planning for lifetime gifts - What planning techniques continue to be effective?**

Llewellyn, Don W. **Real Property, Probate and Trust Journal**. Chicago: Summer 1995. Vol. 30, Iss. 2; p. 213

[Abstract](#) | [Full text](#)

- 21. **The financial services professional's guide to limited liability companies (LLCs)**
Leimberg, Stephan R, Kurlowicz, Ted. Journal of the American Society of CLU & ChFC. Nov 1994. Vol. 48, Iss. 6; p. 48 (10 pages)
[Abstract](#) | [Full text](#) | [Full Text - PDF](#)
- 22. **Estate planning strategies under the Clinton administration: A client's guide**
McDonald, Joseph F. Journal of the American Society of CLU & ChFC. Jul 1994. Vol. 48, Iss. 4; p. 54 (14 pages)
[Abstract](#) | [Full text](#) | [Full Text - PDF](#)
- 23. **Significant Recent Developments in Estate Planning (Part III)**
The Tax Adviser. New York: Dec 1992. Vol. 23, Iss. 12; p. 822 (13 pages)
[Abstract](#) | [Full text](#) | [Full Text - PDF](#)
- 24. **The Importance of Buy-Sell Agreements for Closely Held Corporations**
Abatemarco, Michael J., Cavallaro, Alfred. The CPA Journal. New York: Feb 1992. Vol. 62, Iss. 2; p. 57 (3 pages)
[Abstract](#) | [Full text](#) | [Full Text - PDF](#)

1-24 of 24

Want to be notified of new results for this search? [Set Up Alert](#)

Results per page:

Advanced Search

Tools: [Search Tips](#) [Browse Topics](#) [2 Recent Searches](#)

tax valuation	Document text
AND gift	Document text
AND prior to transfer of asset*	Document text
AND appreciated	Document text
WITHIN 3 asset*	Document text

[Add a row](#) | [Remove a row](#)

Database:

Date range: [About](#)

Limit results to: [Full text documents only](#)

[Scholarly journals, including peer-reviewed](#) [About](#)

[More Search Options](#)

Copyright © 2007 ProQuest LLC. All rights reserved.

